Contract Submission

7/23/2014

General Information

Use this job aid to submit contracts to the CFAES Business Office, Columbus.

- This is for when *we are providing the good or service to someone else.* Typically in these situations we are the ones being paid, however your contract may be for $0.00 and this process would still apply.
- This is for all agreements that need to be signed including contracts, grants, MOU's, MOA's, etc.
- Note: For Space Use Agreements or Purchasing Contracts (where we are buying something or paying someone) use the eRequest Job Aid for Purchase Orders: http://cfaesfinance.osu.edu/training

These submissions will be routed to Angie LeMaster. Phone: 614-292-6470, Fax: 614-688-0529

Process

1. Gather all of the *documents* that you need to submit in an electronic format (ex. PDF, Excel, Word).
2. Navigate to **https://erequest.osu.edu**. All University employees have access to this site using their OSU Internet Username and Password.

The system isn't purposely designed for contract management so there are few modifications to the normal entry process that will be outlined in this help document.

3. Click *New*.

4. Your *Contact Information* will default. If you are requesting this for someone else (like a support staff entering for an educator) you can select Lookup Employee and find that person's name.
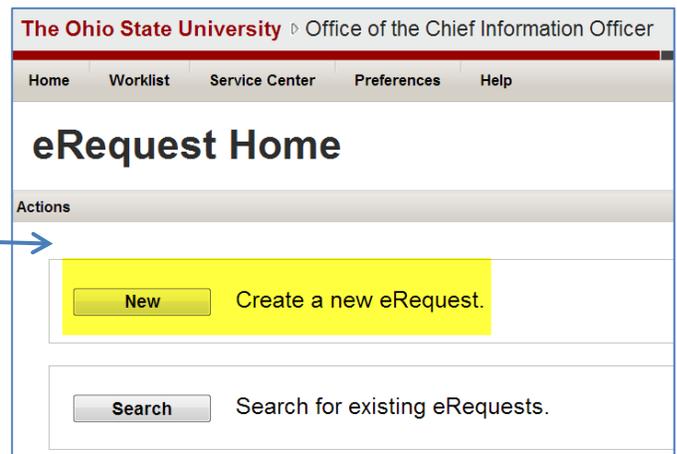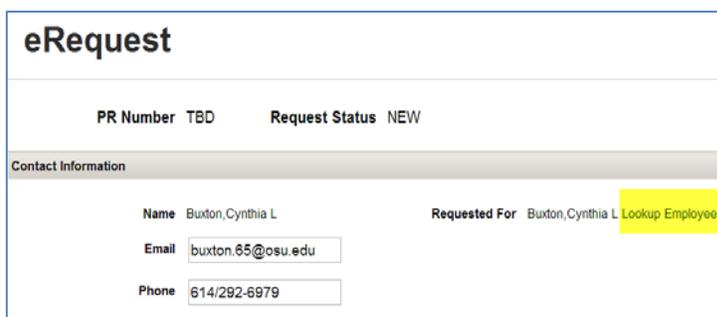
Note: If you don't see a "Lookup Employee" option email buxton.26@osu.edu for access.

THE OHIO STATE UNIVERSITY

COLLEGE OF FOOD, AGRICULTURAL, AND ENVIRONMENTAL SCIENCES

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Important! **Steps 5 and 6 are critical!**
These choices allow your transaction to route to Angie for processing faster than any other choice.

5. Choose the *Purchasing/Payment Option* of Internal Order. Select Internal Order even if your Contract is with an outside agency.

6. Type the word *Contract* into the Quote ID field.
    Type the word contract even if it is for a grant or an MOU or an MOA, etc.

7. Enter the *Short Project Title or Short Description* for your document.

Purchasing/Payment Option

Buy Something

- ○ Standard Purchasing Request
- ○ Purchasing Card Preferred
- ● Internal Order
- ○ Blanket Order Release

Quote ID Contract

8. Enter the *Estimated Amount.* This amount would be the total estimate amount expected for the project. It is a required field even if you put in a zero dollar contract. See three examples for how to enter this below.

★ Description	UOM	★ Quantity	★ Estimated Amount	Total Estimated Amount
Short Project Title - Ex. Childcare Training		6	X 900	= $5,400.00

★ Description	UOM	★ Quantity	★ Estimated Amount	Total Estimated Amount
Short Project Title - Ex. Childcare Training		1	X 5400	= $5,400.00

★ Description	UOM	★ Quantity	★ Estimated Amount	Total Estimated Amount
Short Project Title - Ex. Childcare Training		1	X 0	= $0.00

9. Enter the *Sponsor Name or Affiliated Party Name*

Note: Ignore the note that says the vendor isn't a current internal vendor.

Internal Vendor (Enter Freeform Text, Type To Search or View All)

Council on Aging

10. Enter the *Address* where you would like the contract to be mailed. If a scanned copy is ok enter the email address.

General Request Information

★ **Ship To** (e.g. Building Name, N/A)

OSUE Clover County
Marie Ronald
1234 Salisbury Road
Clover, Ohio 12345

181 characters remaining

Additional Info (e.g. Web Address, Shipping Cost, Special Instructions)

I need three original contracts.
or...
a scanned signature is fine
or...
URGENT - need by Friday

151 characters remaining

★ **Business Purpose for the Item(s) Above**
For Meal Reimbursements - Please Be Specific: what business related issues were discussed, list of attendess, name of place meal took place

This contract describes the working relationship between the Council on Aging and OSU Extension Clover County

145 characters remaining

11. Optional: Enter any additional information in the *Additional Info* section.

12. Enter a basic *Business Purpose* for the contract.

Contract Submission

13. Use the *Add* button to add your contact and any associated documents. Add here what you would normally send via email to Jackie.

Attachments

Add...

Uploaded File Info

File Name	Description	Action
Contract.docx		Delete Attachment
Budget.xlsx		Delete Attachment
Pamphlet for Program.pdf		Delete Attachment

14. In the Funding Source *enter your Department Org Number*.

Funding Source

* Org Number 57017	Search For Approvers/Org	Approvers For Org
Organization Name Washington County		Baker,Alison L
Research Project Number	Search For Project	Johnson,Lee Ann
Special Funding Instructions		Kelbaugh,Beverly Jeanne
		McClain,Brian N

254 characters remaining

Split chartfield by ● Percentage ○ Amount

| BU GL	Org	Fund	Account	Project	Program	User Defined	Percent	Estimated Amt	Split Funding
UNIV ▼	57017	060909	40405				100	$0.00	+ −
	Lookup	Lookup	Lookup	Lookup	Lookup	Lookup			

This will route your transaction for your ORG Approver for approval before flowing to Jackie. If you are a Director this will be approved by your Supervisor or their office.

15. Enter your *Org Number* in the Chartfield Section. The Chartfield isn't optional (even if the system tells you it is).
*Choose the **Business Unit** for the Contract – usually UNIV.
*Enter a **Fund number** that you plan to deposit the money into (usually a 0xxxxx, 5xxxxx, or 3xxxxx). If you don't know the appropriate number just use the fund number you use for your normal mileage submission or ask your Unit's support staff.
*Enter account number 40405. Enter this every time regardless of what type of contract it is.

*Note: Don't worry if you get these wrong - it isn't important for processing your transaction. You just need to enter values that exist so that it will be able to be approved.
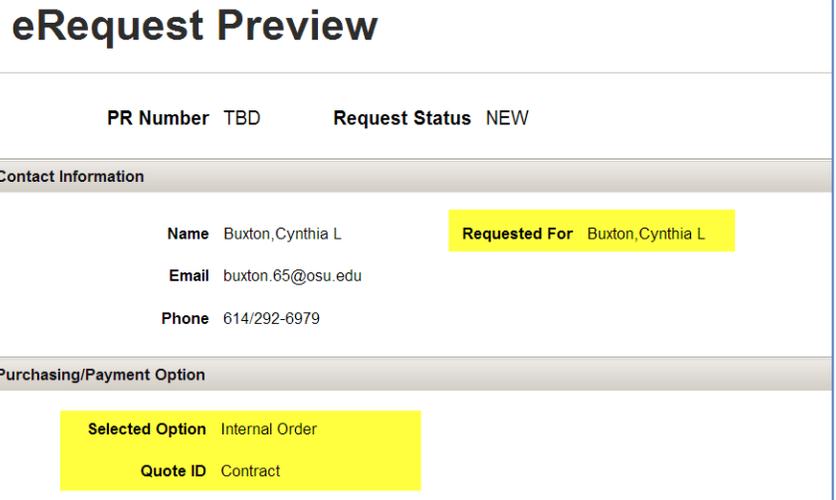
Contract Submission

16. Click *Continue*
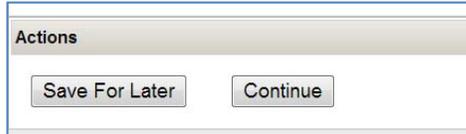
    Actions

    [Save For Later]   [Continue]

17. *Review the Submission.* Make sure you selected Internal Order, the Quote ID says Contract and you have changed the Requested For name to the person that will be able to answer questions about the contract.
    Then Click Submit for Approval.

    ## eRequest Preview

    PR Number TBD   **Request Status** NEW

    Contact Information

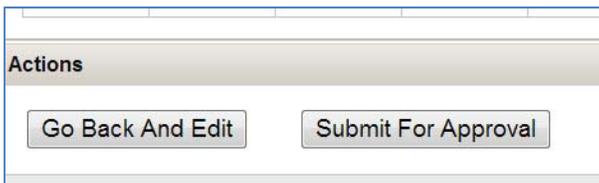   **Name** Buxton,Cynthia L   **Requested For** Buxton,Cynthia L

    Email buxton.65@osu.edu

    Phone 614/292-6979

    Purchasing/Payment Option

    Selected Option Internal Order

    Quote ID Contract

    Actions

    [Go Back And Edit]   [Submit For Approval]

18. Your Org Approver (or Supervisor for Directors) will automatically get an email to approve your transaction and once approved it will automatically route to Jackie for processing.

    You can revisit your submission by referencing your ORG in the Search page of eRequest or by the Unique PR number listed at the top of the confirmation page.

    You can add documents and comments throughout the process and also see comments entered by Jackie regarding its status.

    You can edit or Cancel your submission until it has been approved.

Contract Submission

eRequest Confirmation

| PR Number | PR1242934 | Request Status | PENDING | Last Updated | Buxton,Cynthia L 07/30/2013 2:23 PM |

Your request has been submitted to your assigned approvers

Approvers For Org

McClain,Brian N

Send Copy Of Request To Others

Actions

Create New Request   Return To Home

Normal Contracts take from 2-4 weeks for signature. Work with Jackie if you need special care with your contract.